

Spain - Media Landscape

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Overview

Spain is the second largest country in the EU, with 504,645 km², and the fifth most populated, with 46.4 million inhabitants in 2016.

There are many aspects making the media sector very important. From an economic perspective, the media sector has a significant impact on the country's economy, the 12th largest in the world. In 2014, the culture sector accounted for 2.5

percent of the Gross Domestic Product of the country (Ministry of Education, Culture and Sport - MECD, 2016). Of all cultural activities, the two with the greatest economic impact were book publishing and the press, followed by audiovisual and multimedia activities (including, among others, television, radio, film, video and recorded music). Publishing alone accounted for 34.1 percent of all cultural production; while audiovisual media and multimedia accounted for 27.5 percent.

From the strictly cultural point of view, the media also play a strategic role. Spain is home to the second most spoken language in the world, with 427 million native speakers in 20 countries, only exceeded by Mandarin Chinese. In this global scenario, many Spanish media design their products anticipating their potential extension beyond the borders of the country. However, the main Spanish media market remains the national one. In it, the media play a key role in structuring the cultural market not only of Spanish speakers but also of the many speakers of the main co-official languages: Catalan (spoken by more than 11 million people), Galician (about two million) and Basque (more than one million), primarily. All these languages, as well as some other minority and/or non-official languages (Aranese, Asturian, Aragonese...), have a significant supply of printed, audiovisual and digital media, which are essential in the linguistic and cultural structure of the different communities of speakers.

However, the main influence the media have is political. After the Civil War (1936-1939), Spain underwent four decades of dictatorship (1939-1975), during which freedom of information was curtailed. Since the death of the dictator Francisco Franco in 1975 and the transition to democracy that followed, public and private media have become a cornerstone of public life in the country. Thanks to the freedom of press and the right to information, recognised as fundamental rights by the 1978 Constitution, the media market underwent a radical change during the transition to democracy, a period that historiography considers concluded with the entry of Spain in the European Union in 1986. In just a few years, the media of the Franco regime were replaced by new newspapers, private radio stations and public audiovisual corporations. The emergence of private television channels took a little longer, until the concession of the first four private channels in 1989. This profound reform of the printed and audiovisual media market led to the creation of large private communication groups with diverse ideological alignments.

The media landscape painted in Spain in the early 1990s survives to a great extent today (Salaverría, 2007), and, with it, its wide ideological range. This ideological diversity shows, in fact, two clear axes, which could well be represented by a Cartesian plane. On the one hand, the horizontal axis where the most progressive to the most conservative media would be located from left to right. On the other hand, the vertical axis, ideally representing Spain's more specific struggle between constitutionalist media (defenders of national unity) and nationalist media (in favour of greater autonomy or even the complete independence of their respective territories; this type of media being particularly common in regions such as Catalonia or the Basque Country, but also, to a lesser extent, in other autonomous regions with a strong identity of their own).

The ownership of the private media is distributed mainly among a group of four large nationwide multimedia corporations (Atresmedia, Mediaset España, Prisa, Vocento), in addition to other smaller groups, mainly regional in scope (Grupo Godó, Grupo Zeta, Corporación Voz de Galicia, Editorial Prensa Ibérica, Grupo Joly, Grupo Heraldo, among others). The four largest national multimedia corporations are listed on the stock exchange and, for the most part, have a dispersed shareholding, with an increasing presence of banks, large non-financial corporations and multinational investment funds. Most of the regional media companies have a more concentrated shareholding and, in some of them, the classic figure of the publisher still survives, ie the owner who belongs to a family saga and watches over the editorial continuity of his media. In recent years, with the rise of the Internet, hundreds of independent digital projects have also been created, in many cases actively promoted by the journalists who work in them.

As far as the public media are concerned, these are mainly limited to audiovisual corporations, of both national and regional scope. Some local governments also have small radio and television channels, as well as some printed and digital

publications. The influence of public institutions on the media has a second aspect: subsidies to private media and the concession of institutional publicity. Both the management of the entirely public media and the politics of subsidies and management of advertising are sources of constant controversy. Spanish institutions, both national and regional, are frequently accused of interference in the editorial line of their media, as well as bias in the granting of public aid to private media, advertising investment and even control of their contents.

This landscape, in which large and small private communication companies coexist, together with public audiovisual corporations, fits into the pluralistic polarised media system typical of Mediterranean countries described by Hallin and Mancini (2004). Certain distinguishing notes of the Mediterranean model drawn by these two authors can be observed with particular intensity in Spain:

- the low circulation of newspapers, which has been exacerbated since the end of the last century by the impact of the Internet and, since 2008, by the economic crisis;
- a journalism with a pronounced tendency towards commentary, in which the creation of opinion matters more than information, which favours, for example, the multiplication of political chat shows on radio and television;
- a weak professionalisation, with a limited degree of associationism among journalists, who often suffer from very poor working conditions;
- a strong state intervention in the media which, in fact, is intensified by the administrative structure of the country, since, in addition to a national audiovisual entity (*Radio Televisión Española*, RTVE), 12 of the 17 autonomous regions have their own audiovisual corporation, controlled by their respective governments.

Proof of these close relations between media and political parties is the increasingly frequent phenomenon of "revolving doors": politicians who hold managerial positions in the media and journalists who become politicians. In 2017, two regional presidents (those of Catalonia and Navarre) and dozens of members of the national and regional parliaments are journalists turned politicians.

These characteristics of the Spanish media system have led to a growing perception by citizens that the media, especially those linked to large public and private corporations, are guided mainly by political interests and business clientelisms, and not so much by public service. Certainly, Spain stands out as one of the countries where citizens show greatest distrust of the media. In the Eurobarometer on Media pluralism and democracy (European Commission, 2016), Spain ranked 27th among the 29 countries of the European Union in terms of citizens' perception of the diversity of views and opinions in the media. According to the same Eurobarometer, in Spain, the media considered "not reliable" are, above all, television and social networks; within a general sense of lack of credibility, radio is considered the most credible medium, even ahead of newspapers. Indeed, the distrust seems to be directed towards television and digital media in particular. According to the Digital News Report 2016 (Reuters Institute, 2016; Center for Internet Studies and Digital Life, 2016), Spain was the fourth country -of 24- in which the audience most believed that their online media are subject to improper political and governmental influences, and the fifth in which economic and commercial influences were most identified.

However, other sociological studies give more credibility to the media. For example, according to the April 2015 Barometer of the Centre for Sociological Research (CIS), the media are the institution that inspires the third-highest degree of trust (average of 4.57 from 0 to 10), behind the Armed Forces and the Civil Guard and ahead of the Church, the Ombudsman or the various political and judicial institutions of Spain.

1. Media

1.1 Print

According to estimates by the *Asociación de Editores de Diarios Españoles* (Association of Spanish Newspaper Publishers - AEDE, 2016), in 2015, 107 newspapers were published in Spain, with a total circulation of around 2.1m copies a day. Ten years earlier, in 2006, the Spanish press sold 4m copies a day, according to the data audited by the *Oficina de Justificación de la Difusión* (Circulation Audit Bureau - OJD). This means that, in just a decade, Spanish newspapers reduced their circulation by almost half.

On the other hand, most of the circulation is concentrated in a few titles. In 2015, 56 percent of Spanish newspapers maintained an average circulation of less than 10,000 copies (AEDE, 2016). The main newspapers are, of course, the national ones, but also a few regional newspapers, solidly based in their respective territories. All the newspapers are published in tabloid format but, unlike other European countries, Spain has no sensationalist newspapers as such.

In the general information press, the newspaper of greatest circulation is *El País*. Founded in Madrid on 4 May 1976, just six months after the death of the dictator Franco, it is considered the most emblematic and influential medium of the last four decades of Spanish democracy. Of progressive ideology, its editorial approach has traditionally been close to social democracy, embodied in Spain by the *Partido Socialista Obrero Español* (Spanish Socialist Workers' Party - PSOE). Owned by PRISA, one of the country's main communication groups, since its foundation, it has remained the most widely read general information newspaper. It has also become the Spanish medium of reference for the international press. That sustained leadership has not, however, prevented the newspaper from suffering a severe fall in its circulation in recent years. In contrast to the more than 435,000 copies that, according to the OJD, it sold daily at the end of the 20th century (specifically, in 1999), at the end of 2016, *El País* reached an average daily circulation of just over 185,000 copies. This decline, particularly pronounced since the economic crisis unleashed in 2008, has significantly damaged the newspaper's accounts, leading to changes in its shareholdings. Within the editorial staff, the fall has resulted in hundreds of journalists being dismissed -the number of workers in the newspaper dropped from 899 in 2008 to 334 in 2015 (*PR Noticias*, 2017)-, several changes of director and a general reorientation of the newspaper's editorial strategy, which has changed from being focused on the print business to giving priority to digital platforms, in an attempt to become the medium of reference in Spanish on a global scale.

There are another three national general information newspapers based in Madrid: *El Mundo* (founded in 1989 and owned by the Unidad Editorial group, sold just over 100,000 copies in November 2016), *ABC* (founded in 1903, Vocento, 84,000 copies, 11/2016) and *La Razón* (founded in 1998, Grupo Planeta, 65,000 copies, 11/2016). These three newspapers are located, with different intensities, in a liberal-conservative ideological spectrum and have a constitutionalist editorial line.

Like *El País*, the rest of the Spanish press has also suffered a pronounced fall in circulation and has drastically reduced its workforce. According to an analysis by *PR Noticias* (2017) based on data from the White Paper of the Daily Press 2016, Spanish newspapers as a whole cut their workforce by 43 percent in the seven years after the crisis: from 10,454 employees in 2008, to 5,942 in 2015 (that is, 4,511 jobs were destroyed).

In addition to these titles published in the country's capital, other major Spanish general information newspapers are *La Vanguardia* (Barcelona, 1888, Grupo Godó, 104,000 copies, 11/2016), *El Periódico de Catalunya* (Barcelona, 1978, Grupo Zeta, 77.000 copies, 11/2016), *La Voz de Galicia* (La Coruña, 1882, Corporación Voz de Galicia, 73,000 copies, 12/2015), *El Correo* (Bilbao, 1910, Vocento, 73,000 copies, 12/2015), *El Diario Vasco* (San Sebastián, 1934; Vocento; 53.000 copies, 12/2015), *La Nueva España* (Oviedo, 1936; Editorial Prensa Ibérica; 43.000 copies, 12/2015) and *Heraldo de Aragón* (Saragossa, 1895, Grupo Heraldo, 36,000 copies, 12/2015), among others. Each of these newspapers is leader in its

respective territory.

The sports press is very popular in Spain. It has four main representatives: *Marca* (founded in 1938; Unidad Editorial), *As* (1967; PRISA), *Mundo Deportivo* (1906; Grupo Godó) and *Sport* (1979; Grupo Zeta). The first two are published in Madrid and the other two in Barcelona, and give priority attention to the football teams of their respective capitals. In fact, an overwhelming majority of their covers are devoted to Real Madrid and FC Barcelona. These four newspapers have sales below those of the main national daily newspapers but, in contrast, their audience is very high. According to the *Estudio General de Medios* (General Media Survey - EGM) of March 2016, *Marca* was the top printed medium in Spain, with 2.3 million readers a day. The other three sports newspapers also held outstanding positions in that same ranking: *As*, fourth with 1.2 million; *Mundo Deportivo*, seventh with 508,000; and *Sport*, tenth with 453,000. In addition to these four newspapers, some other newspapers and sports magazines of lower circulation are published in several capitals of the country.

Spain also has press specialised in economic information. After the closure of *La Gaceta de los Negocios* in 2013, Spain now has three printed economic journals, all in Madrid: *Expansión* (1986; Unidad Editorial), *Cinco Días* (1978; PRISA) and *El Economista* (2006; EcoPrensa). Within the specialised press, in the past Spain also had the printed edition of a medical journal, *Diario Médico*, but today it is only published in digital format.

As for the free press, in the middle of the first decade of 2000, Spain became the world leader in the reading of free newspapers. Their aggregate circulation exceeded that of all paid newspapers together: in 2006, it reached 5m copies a day (Bakker, 2007). However, once again the economic crisis decimated this sector of the press, causing virtually all titles to disappear (*Metro*, *Qué!*, *ADN*...). In 2016, there was only one major free newspaper published on paper: *20 Minutos*, with editions in Madrid, Barcelona, Valencia and some cities in Andalusia. This newspaper, owned by the Norwegian group Schibsted during the years of greatest prosperity, was sold to Grupo Heraldo in the summer of 2015.

The market for printed magazines has also been severely affected by the crisis. If, according to the *Estudio General de Medios* (EGM), in 2000 their aggregate audience amounted to 53.6 percent of Spaniards, in March 2016 that figure had dropped to 37.3 percent. According to the same survey, the three largest weekly magazines were *Pronto* (3.1 million readers), *Hola!* (2.1 million) and *Lecturas* (1.3 million), all women's magazines. As for the monthly magazines, the main ones were *Muy Interesante* (1.8 million), *National Geographic España* (1.7 million) and *Saber Vivir* (1.1 million), devoted to the dissemination of knowledge.

Dozens of magazines have disappeared since the beginning of this century and virtually all of them have seen their sales and advertising revenues drop significantly. The weekly supplements of newspapers have also fallen in number and circulation.

1.2 Radio

Radio is a medium of major scope and influence in Spain. More than just a medium of information or entertainment, it is a genuine catalyst for public opinion. The presenters of the magazine programmes of the main stations (*Cadena SER*, *Cope*, *Onda Cero*, *Radio Nacional de España*) are among the most influential journalists among citizens.

The Spanish radio audience has remained stable in recent years, relatively oblivious to the ups and downs that other media have suffered because of the crisis. According to the EGM, in March 2016 the radio in Spain reached the figure of 25.9 million daily listeners, of which 11.4 million consumed generalist radio and 14.5 million specialised radio (mainly musical). This figure includes both the consumption of radio through traditional devices and online radio, a second channel on the rise.

As with television audiences, leadership in radio belongs to private companies. In the second EGM survey of 2016 (which goes from October 2015 to May 2016), the leading radio network was *Cadena SER*, which belongs to PRISA group, with

about 4.3 million daily listeners according to EGM. Other popular stations were *Cadena COPE* (2.5 million), *Onda Cero* (1.7 million), *RNE* (RTVE - 1.3 million) and some regional radio networks.

1.3 Television

In 2017, television in Spain has six main actors:

- two large private audiovisual corporations, Mediaset España and Atresmedia, leaders in audience and advertising billing mainly thanks to their generalist channels, as well as to the rest of their segmented channels;
- national public television (*Radio Televisión Española*, RTVE);
- digital television platforms (Movistar+, Vodafone TV, Orange TV...), which combine the pay television offer, consisting of generalist channels, specialised channels and systems of subscription to audiovisual contents (Netflix, HBO España...);
- private channels broadcasting nationally but with smaller audiences (*13TV*, *Intereconomía*...);
- regional public television;
- local television channels.

Due to the continuous corporate movements in the audiovisual sector, it is common for a channel or service that originally belonged to a certain operator to be taken over by its competing company. However, the general structure of television in Spain is basically represented by the six actors described.

The Spanish media market has a high degree of business concentration: 20 companies invoice approximately 75 percent of the revenues of the 100 largest private media companies. The television medium is the one that carries a larger share, with almost 60 percent of the market, as indicated in the Annual Report of the Journalistic Profession 2016 (APM, 2016). The situation of dominance is such that the two main private companies, Mediaset España and Atresmedia, are often classified as a "duopoly". Almost 90 percent of the total advertising investment in television is distributed between the two companies (*El Confidencial*, 2016). This is achieved mainly due to the success of the audience of their generalist channels -*Telecinco* and *Cuatro* in the case of Mediaset España, *Antena 3* and *LaSexta* in the case of Atresmedia- but also due to another external factor: The decision adopted by the Government in 2009 to withdraw advertising from RTVE, the national public television. The disappearance of this public competitor, at least as far as advertising is concerned, has made it possible for the two large private companies to achieve an undeniable position of advertising dominance.

The APM (2016) reveals that television is still the medium most Spaniards choose to stay informed. It is noteworthy that this medium exceeds the majority in all age groups in Spain, while for other media, such as social networks or printed newspapers, age is a clear discriminator: the younger-age group show a clear preference for social networks and newspapers on the web over printed media.

According to the 2016 *Informe Barlovento* (Barlovento Report), "a decrease has been observed in the average television consumption time of Spaniards." In 2015, the daily average per person was 3 hours and 54 minutes; the estimated forecast for 2016 was 3 hours and 49 minutes, about 5 minutes less. The main decline is among those aged under 45, while those aged over 64 have increased their television consumption time by 5 minutes, reaching a consumption of 5 hours and 48 minutes a day.

Broadly speaking, despite this slight decrease in the overall average, watching television is one of the most common activities among Spaniards: "Apart from sleeping, working or studying, watching TV is the activity on which most time is spent; in fact it represents 16 percent of the day on average," according to the 2016 Barlovento Report (Barlovento Comunicación, 2016).

According to the Deloitte report, *Fortalezas de la TDT 2016* (Strengths of DTT 2016), compiled by the *Unión de Televisiones Comerciales en Abierto* (Union of Free-to-Air Commercial Television Channels - UTECA), digital terrestrial television (DTT) is the most widely consumed television in Spain (81 percent), even among subscribers to pay TV channels, 70 percent of whom consume this free digital television. In terms of overall video consumption, traditional television is still the most consumed (70 percent), even among the youngest age group (15-34 years), although in this age group it falls to 58 percent since they consume more video on YouTube and Facebook (19 percent of the time). According to this report, “social networks are a good ally of television,” since 85 percent of active users of Twitter in prime time tweet about television and a third of these active users change channels to see a programme on about which they have received some information through Twitter.

1.4 Digital Media

The internet media have a history of somewhat more than twenty years in Spain (Salaverría, 2016). The first online news publication was the weekly *El Temps*, in June 1994. The first newspapers soon appeared -*El Periódico de Catalunya* and *El Mundo* were the pioneers-, the first radio and television channels, and even the first media created on the Internet itself. After the first ten years, a survey showed 1,274 active Internet media in Spain (Salaverría, 2005).

In 2017, there is no updated general census, but it seems clear that the number and, above all, the influence of digital media has increased. According to the EGM (AIMC, 2016), the Internet was the second most consumed medium in Spain (69.9 percent of the population accessed it daily), exceeded only by television (88.3 percent). Just ten years earlier, in 2006, the daily Internet audience was just 26.2 percent.

Of course, citizens spend much of their time online on entertainment, financial and business activities and social relationships. However, information consumption has also become an essential part of these habits.

The Digital News Report, in its study on Spain, shows which are the favourite media for the consumption of news on the Internet. The main brands are, in this order: *El País*, *El Mundo*, *20 Minutos* and *Antena 3*. The first three are newspapers and a TV channel appears only in the fourth place.

It is worth noting the consolidation that digital native media have achieved. According to ComScore, the official Internet media gauge in Spain, by the end of 2016 the ranking of online information media was headed by *Elmundo.es* and *ElPaís.com*, but in the third place was a native digital medium: *ElConfidencial.com*. The establishment of digital media also refers to its number: Between January 2008 and November 2015, 458 new media were launched in Spain, the vast majority of which appeared on the Internet (APM, 2015).

According to the Digital News Report 2016, in Spain, 50 percent of adult online news consumers younger than 45 years read the news mainly on the mobile phone, compared to 38 percent on the computer and 7 percent on the tablet, and in general the mobile is now the leading news device for one in three adults of any age. Up to 52 percent use two or more types of devices to get information throughout the week, four percentage points more than a year ago.

1.5 Social Networks

As in the rest of the western countries, social networks have managed to capture millions of users in Spain, taking up the attention of a lot of people. According to the Arena & The Cocktail Analysis (2016), in 2016 social networks were used by 91 percent of Spanish Internet users.

In 2016, the Spanish market was led by Facebook, with more than 21 million registered users and 88 percent penetration. Instagram (41 percent) overtook Twitter (39 percent) as the second most used social network. Other popular social networks

were LinkedIn (26 percent), Pinterest (15 percent) and Snapchat (9 percent).

Within the social networks, the Digital News Report 2016 highlights the fact that "Spain is the leading market in the use of WhatsApp (26 percent) and Twitter (19 percent) for news, tripling and doubling the global average, respectively." It is also noteworthy that 49 percent of users in Spain look at or comment on the news on Facebook during the week. However, it is observed that "generalist social networks are stagnant or decreasing, but 7 percent see the news on Instagram, 3 percent on Telegram, and 2 percent on Snapchat; only 13 percent of young users do not get, share or comment on news through a social network in a typical week."

1.6 Opinion Makers

As in other Western countries, the ranking of the most followed Spaniards on the Internet is led by celebrities. According to a study published at end of 2016 by a social media consultancy company, the most followed Spaniards on Twitter, Facebook and Instagram were well-known names of sports ?football mainly?, as well as the show business (Apple Tree, 2016). Another sphere with a significant number of influential users was the fashion business.

Although also quite popular and very active in networks, journalists generally did not reach popularity level of celebrities. According to the ranking of another social media monitoring company, at the end of the first quarter of 2017 only one Spanish journalist accumulated more than one million followers in Twitter: the television reporter and interviewer Ana Pastor, with 1.8 million followers. At that moment, just eight other Spanish journalists had more than half a million followers in that same network (Twitter-Spain, 2017).

As for blogs, the leadership corresponded to those specialised in technology. According to another known ranking of popularity on social networks, *Xataka*, which specialises in digital devices and consumer technology, was the most-read blog in Spain, with more than 150,000 subscribers by the end of the first quarter of 2017 (Alianzo, 2017). Many digital news media outlets keep publishing specialised blogs in their pages. However, their presence within traditional media has declined significantly in recent years, as the blog phenomenon has been losing its aura of novelty in favor of other emerging platforms, such as social networks.

1.7 Sources

The list below is just a selection of the most salient news media outlets of each kind in Spain by 2017. There are thousands of additional media outlets working not listed here, either in print, radio, television and, especially, Internet. In our list, we select those with bigger audience, overall highest influence, and/or national -that is, not only local- reach.

Newspapers

- [20 Minutos](#) (Madrid)
- [ABC](#) (Madrid)
- [As](#) (Madrid)
- [Cinco Días](#) (Madrid)
- [Diario de Navarra](#) (Pamplona)
- [El Correo](#) (Bilbao)
- [El Diario Vasco](#) (San Sebastian)
- [El Economista](#) (Madrid)
- [El Mundo](#) (Madrid)
- [El País](#) (Madrid)

- [El Periódico de Catalunya](#) (Barcelona)
- [Expansión](#) (Madrid)
- [Heraldo de Aragón](#) (Saragossa)
- [Ideal](#) (Granada)
- [La Nueva España](#) (Oviedo)
- [La Razón](#) (Madrid)
- [La Vanguardia](#) (Barcelona)
- [La Voz de Galicia](#) (A Coruña)
- [Levante - EMV](#) (Valencia)
- [Marca](#) (Madrid)
- [Mundo Deportivo](#) (Barcelona)
- [Sport](#) (Barcelona)
- [Sur](#) (Malaga)

Radio

- [Cadena COPE](#) (national)
- [Cadena SER](#) (national)
- [Onda Cero](#) (national)
- [Radio Nacional de España - RTVE](#) (national)

Television

- [13TV](#) (national)
- [Antena 3](#) (national)
- [Cuatro](#) (national)
- [Intereconomía TV](#) (national)
- [LaSexta](#) (national)
- [Telecinco](#) (national)
- [Televisión Española - RTVE](#) (national)

Digital media

- [Ctxt](#) (Madrid)
- [El Confidencial](#) (Madrid)
- [El Español](#) (Madrid)
- [El Huffington Post](#) (Madrid)
- [El Independiente](#) (Madrid)
- [El Nacional](#) (Barcelona)
- [El Plural](#) (Madrid)
- [Eldiario.es](#) (Madrid)
- [ESdiario](#) (Madrid)
- [InfoLibre](#) (Madrid)
- [La Información](#) (Madrid)
- [Libertad Digital](#) (Madrid)
- [NacióDigital](#) (Barcelona)

- [Okdiario](#) (Madrid)
- [Público](#) (Madrid)
- [Valencia Plaza](#) (Valencia)
- [Voz Pópuli](#) (Madrid)

Directories of Spanish media

- [Agenda de la Comunicación](#) (official directory of communication), compiled by the Government of Spain.
- [Observatorio de Nuevos Medios](#) (Spanish language online-only media directory)
- [Asociación Española de Editoriales de Publicaciones Periódicas](#) (AEEP)
- [Asociación de Editores de Diarios Españoles](#) (AEDE)
- [Guía de la radio](#) (National directory of radio stations)

2. Organisations

2.1 Trade Unions

The Spanish media have several employers' organisations, which bring together most of the companies in the sector. They meet according to platforms -press, radio and television- but there is no organisation that represents the interests of all communication companies as a whole.

In the printed press, the two main organisations are the *Asociación de Editores de Diarios Españoles* (Spanish Association of Daily Publishers - AEDE) and the *Asociación Española de Publicaciones Periódicas* (Spanish Association of Periodical Publications - AEEPP). The first, and most influential, covers the main paid newspapers, while the second is composed of specialised publications, local magazines and free newspapers.

In the field of digital media, in 2009, an employers' organisation, called MediosOn, which represented the interests of a large number of internet media, particularly those linked to printed newspapers was founded. However, after a period of some activity in its early years, it was dissolved in 2014. In 2017, several press publishing companies in Spain (PRISA, Unidad Editorial, Grupo Godó, Vocento and logenia) are part of the Online Publishers Association Europe (OPA Europe).

In the field of audiovisual media, the two main employers' organisations are the *Unión de Televisiones Comerciales Asociadas* (Union of Associated Commercial Televisions - UTECA) and the *Asociación Española de Radios Comerciales* (Spanish Association of Commercial Radios - AERC). The regional radio and television corporations are also grouped into one organisation, the *Federación de Organismos de Radio y Televisión Autonómicos* (Federation of Regional Radio and Television Organisations - FORTA).

2.2 Journalist Associations

Spanish journalists have a low level of associationism. There are professional associations at the national and, above all, regional level, but with few exceptions, they have a small number of members.

There are two types of journalists organisations: professional bodies and associations. The professional bodies are corporations regulated by law, which determines the rights and duties of professionals, as well as a particularly controversial issue: The requirements for membership of the professional group. Meanwhile, associations are simple meetings of professionals in order to defend their rights. In Spain, the regulation of professional bodies is the responsibility of the

autonomous regions and only some of the 17 regions have a professional body of journalists: Andalusia, Castile and León, Catalonia, Galicia, La Rioja, Region of Murcia and the Basque Country. In some other regions, there are more or less advanced initiatives to form them.

Meanwhile, professional associations are grouped around the *Federación de Asociaciones de Periodistas* (Federation of Journalists Associations - FAPE), the main professional organisation of journalists in Spain. It has 49 federated associations and 16 linked associations, representing a total of more than 21,000 associates. Federated associations are organised according to provenance, either regionally or provincially, while associates do so mainly by thematic specialisation (e.g. health, sports and parliamentary information).

In recent years, the main concern of the journalists' bodies and associations has been the deterioration of the working conditions. Although the unemployment recorded among journalists in 2016 fell by 9.1 percent (7,890 people) from the previous year, it was still 74 percent higher than in 2008, when the economic crisis began, as recorded in the APM 2016. However -fortunately-, in 2016 the labour market offered good news for the third year running. When it comes to gender, the number of unemployed women journalists (5,029) is much higher than that of men (2,861). However, unemployment has declined more among women.

For more than half of the journalists, the main problems were unemployment and job insecurity, followed by low pay for their work, according to the *Informe Anual de la Profesión Periodística 2016* (Annual Review on the Journalistic Profession - APM, 2016). The monthly salaries were mainly in the range of €1,000 to €3,000, with generally lower salaries among the self-employed, especially photographers and camera operators. In fact, among those who receive salaries of less than €1,000, the percentage of self-employed practically quadruples that of hired workers.

2.3 News Agencies

The most important news agency in Spain is EFE, publicly owned and founded in 1939. By volume of production and outreach, it is the world's leading news agency in Spanish. It has contracted journalists and collaborators in more than a hundred countries, who are coordinated through four publishing boards: in Madrid, Bogota, Cairo and Rio de Janeiro (EFE, 2017). Within Spain, the second most important agency is Europe Press, first of the private agencies, founded in 1957. It is followed by Colpisa, linked to the Vocento Group.

There are also a number of regional agencies: *Agencia Aragonesa de Noticias* (Aragon), ACN Press (Canary Islands), ICAL (Castela and León), *Agència Catalana de Notícies* (Catalonia) and *Axencia Galega de Noticias* (Galicia). Until 2015 there was also an agency in the Basque Country, called *Vasco Press*, but it closed due to economic losses.

There are also a number of specialised agencies. Some are specialised by media (for example, television agencies or Internet producers), and others by topic (many are devoted to gossip).

2.4 Audience measurement organisations

Spain has several audience auditors, distributed by platforms. The one with the broadest spectrum is the *Asociación para la Investigación de Medios de Comunicación* (Association for Media Research - AIMC), which coordinates the *Estudio General de Medios* (General Media Survey - EGM). Based on tens of thousands of personal surveys distributed in three waves throughout the year, this survey analyses the audience of television, radio, daily newspapers, magazines, supplements, films and the Internet.

There are also measurement organisations segmented by media. The oldest one is the *Oficina de Justificación de la Difusión*

(Circulation Audit Bureau - OJD), which has certified the circulation of printed publications since 1964. For Internet publications, the main measuring company is ComScore. In the field of television, in addition to the EGM, the multinational company Kantar Media also conducts audience surveys in Spain. There are also measurers of advertising investment in the media, such as Infoadex.

According to the APM (2016), the advertising billing of the media increased by 5 percent in 2015, compared to the previous year. Radio, in spite of being, in general terms, the sector that bills least (€389m), is the one that has shown a bigger rise (12 percent). Television follows the moderate upward trend of the last two years and is still the sector with the highest turnover (€3.318m). Newspapers and magazines, on the other hand, have continued to fall since 2011, although the rate of decline has been slowing down (2 percent and 1 percent, respectively).

Advertising investment follows the upward trend that began after 2013 (Salaverría, 2014), the year with the lowest results, and in 2015 it was around €4bn. The figures are still much lower than prior to the 2008 crisis, when more than \$7bn were invested in advertising.

2.5 Sources

- [Agencia Aragonesa de Noticias](#)
- [Agència Catalana de Notícies](#)
- [Agencia EFE](#)
- [Agencia ICAL](#)
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- [Asociación Española de Publicaciones Periódicas](#) (AEEPP)
- [Asociación Española de Radios Comerciales](#) (AERC).
- [Asociación para la investigación de medios de comunicación](#) (AIMC)
- [Axencia Galega de Noticias](#)
- [Federación de Asociaciones de Periodistas](#) (FAPE)
- [Federación de Organismos de Radio y Televisión Autonómicos](#) (FORTA).
- [Infoadex](#)
- [Información y Control de Publicaciones](#) (OJD)
- [Interactive Advertising Bureau](#) (IAB Spain)
- [Kantar Media](#)
- [Unión de Televisiones Comerciales Asociadas](#) (UTECA)

3. Policies

3.1 Media legislation

As a democratic country, Spain recognizes the right to information and freedom of the press in its supreme law. It also guarantees respect for the conscience clause and the professional secrecy of journalists. It also expressly prohibits prior censorship. Contained in Article 20 of the 1978 Constitution, all those prerogatives are recognised as an especially protected fundamental right.

Under these rights, Spain has several specific laws that regulate the activity of the media. The most significant are, first, the Act regulating the information professionals' conscience clause of 1997. Although the legal implementation of this

fundamental right was already provided for in the Constitution, it was necessary to wait for more than twenty years.

Although it transcends the scope of the media, another fundamental regulation for journalism is the Intellectual Property Act, of 1996, later amended in 2014. This Act regulates the intellectual authorship and the commercial use of artistic and journalistic works. The reform of 2014 was especially controversial, introducing the so-called "Google Tax": An economic compensation that had to be paid by Internet portals and link aggregators for publishing media-owned information content. In disagreement with this law, the only one of its characteristics in the world, in December 2014 Google decided to close its Google News service in Spain.

Also controversial was the 2015 Act for the Protection of Citizen Security. This legal standard was christened by its critics as the "gag law", due to its restrictive regulation of the public freedoms of declaration and of information.

Finally, another key law in the regulation of the media, particularly radio and television, is the General Law of Audiovisual Communication, 2010. In accordance with the European directives, this law establishes the right to pluralistic and transparent audiovisual communication, cultural and linguistic diversity, the protection of minors and persons with disabilities and the control of audiovisual content.

3.2 Accountability systems

Compared with other European countries, Spain is underdeveloped in terms of media institutions and responsibility systems. The control of media activity usually rests with the State and the courts, which, in response to the claims received, supervise and, where appropriate, penalize abusive activities.

Part of the supervision system is the responsibility of the Audiovisual Councils, whose regulation is implemented by some autonomous regions. There is no national Audiovisual Council, which makes Spain an exception in the European Union as a whole. The only two regional councils in 2017 -those of Catalonia and Andalusia- control the activity of radio and television in their respective territories, ensuring that the contents and broadcasting times respect the established norms. Navarra had also had an Audiovisual Council since 2001, but it was closed in 2011 to reduce public spending.

The media also have some self-regulation mechanisms, which are reinforced by the existence of some associations. The most important ones are the *Asociación de Autorregulación de la Comunicación Comercial* (Association for the Self-Regulation of Commercial Communication - AutoControl), devoted to supervising respect for the legality of advertising messages, and the *Código de Autorregulación de Contenidos de TV e Infancia* (Code of Self-Regulation of TV Content and Children), subscribed by several television companies. There are also organisations that ensure the protection of media consumers, such as the *Asociación de Usuarios de la Comunicación* (Association of Communication Users - AUC).

Within the media, some have the figure of the ombudsman (Maciá Barber, 2006). Traditionally there have been three types: the Defender of the Reader for the press, of the Listener for the radio and of the Viewer for the television. In recent times, some digital native media have incorporated their own modality; *Eldiario.es* was a pioneer in 2012 with the implementation of the "defender of the community". Among the newspapers, *El País* and *La Vanguardia* have had this figure for the longest. Public television companies like RTVE also have the same figure.

Another self-regulatory body is the *Comisión de Arbitraje, Quejas y Deontología del Periodismo* (Committee of Arbitration, Complaints and Ethics of Journalism), which is attached to the *Federación de Asociaciones de Periodistas de España* (Federation of Journalists Associations of Spain - FAPE). According to the Code of Ethics of the FAPE, this committee analyses the complaints received regarding alleged ethical faults by Spanish media or journalists.

3.3 Regulatory authorities

In addition to the Audiovisual Councils which, as we have already mentioned, in 2017 operate in only 2 of the 17 autonomous regions, Spain has a national regulatory body: The *Comisión Nacional de los Mercados y la Competencia* (National Commission on Markets and Competition - CNMC). This public institution, independent of the Government and controlled by Parliament, ensures respect for the law and fair competition in many areas: energy, transport, telecommunications, postal sector and, for what concerns us here, the audiovisual market. In this area, the CNMC on its own initiative or at the request of third parties issues reports on the audiovisual sector and imposes penalties in the event of non-compliance with legal regulations.

3.4 Sources

Media legislations

- [Constitución Española](#) (1978 - see especially art. 20th)
- [Ley de Propiedad Intelectual](#) (1996)
- [Ley General de la Comunicación Audiovisual](#) (2010)
- [Ley Orgánica de protección de la seguridad ciudadana](#) (2015)
- [Ley Orgánica reguladora de la cláusula de conciencia de los profesionales de la información](#) (1997)
- [Modificación de la Ley de Propiedad Intelectual](#) (2014)

Accountability systems

- [Asociación de Autorregulación de la Comunicación Comercial](#) (AutoControl)
- [Asociación de Usuarios de la Comunicación](#) (AUC)
- [Código de Autorregulación de Contenidos de TV e Infancia](#)
- [Comisión de Arbitraje, Quejas y Deontología del Periodismo de la FAPE](#)

Regulatory authorities

- [Comisión Nacional de los Mercados y la Competencia](#) (CNMC)
- [Consejo Audiovisual de Andalucía](#)
- [Consejo Audiovisual de Cataluña](#)

4. Education

4.1 Universities and schools

The history of journalism studies in Spain dates back to 1926, the year in which the newspaper *El Debate* opened the first school for journalists. During the almost one hundred years that have passed since then, the study of Communication in general, and Journalism in particular, has experienced constant development and consolidation (Salaverría & Barrera, 2009). Today 40 Spanish universities offer degrees in one or other of the disciplines of communication, as well as related postgraduate programmes.

In Spain, according to the report of *Datos y cifras del sistema universitario español. Curso 2015/2016* (Data and figures of the Spanish university system. Course 2015/2016 - MECD, 2016b), there was a forecast of more than 1.3 million undergraduate

university students (more than one million of them in public universities). In Social Sciences (where Communication studies are included) and Legal Sciences, more than 600,000, being the most numerous area. According to the Ministry of Education 21,076 studied in the academic year 2015-2016 in the area of Journalism and Communication (MECD, 2016c).

Of the 40 faculties offering Communication Studies in Spain, most offer degrees in Journalism, Audiovisual Communication and Advertising and Public Relations. Since about a decade ago, double degrees have been added (with History, Philosophy, Philology, Law or Business Management among others). In recent years, Marketing has also been added to Communication Studies (at the Pontifical University of Salamanca and the University of Navarra, for example). These studies, based on the process of convergence with the European Higher Education Area, have curricula consisting of a total of 240 ECTS credits structured in four academic years.

The offer of master's degrees in Communication in Spain is wide and diverse. There are 1,291 master's students in the area of Journalism and Communication, within the 90,000 in the area of Social and Legal Sciences (MECD, 2016a).

Practical experience in companies is considered and recognised as a key element in the practical-experimental training of the degrees. That is why efforts to obtain a large and recognised group of companies with which to sign an internship agreement have become a priority for the faculties.

4.2 Professional development

The role of scholarship holders in the media is a continuous subject of debate in Spain. On the one hand, it is clear that young students and graduates should have access to practical experience that allows them to become familiar with the profession. However, this circumstance often degenerates into abuses: media that use scholarship holders so as not to hire professional journalists, excessive hours, poor salaries, etc.

Of the journalists surveyed by the APM (2016), 93 percent worked as scholarship holders. It is striking that almost half of them did not receive remuneration for this work and that 40 percent did not have any tutor to guide or teach them. It has also been observed that the scholarships are extended in more than half the cases.

According to the survey by Pérez-Serrano et al (2015), "the duration of internships among the media with the highest contracting rate ranges from two to four months, mostly included in the summer period." According to this same survey, the remuneration of the internships shows very pronounced differences: from the absolute lack of remuneration up to a maximum of €474.86 a month, offered by the publicly owned EFE Agency.

According to the APM (2016), in 2015, 3,478 people obtained the degree in Journalism and 3,210 in Audiovisual Techniques. The trend is a slight and constant growth since the decrease suffered in 2006, although strangely 2015 has shown a decrease of 12 percent, since in 2014 an unusual number of students of Journalism graduated (3,951).

Between 2011 and 2015, 16,167 people graduated in Journalism in Spain. In that five-year period, and despite the economic crisis, the downward trend of the previous ten years was broken. This peculiar situation explains why, according to the APM study (2016), 74.6 percent of journalists surveyed consider that the number of graduates who finish degrees related to journalism per year "is excessive, there are too many graduates."

In 2016, 73 percent of the journalists surveyed in the APM report (2016) were hired by some company and 27 percent are self-employed. Conventional television concentrated the largest number of journalists hired, followed by the daily printed press. It should be noted, however, that the 2016 WPA report was based on a sample of 1,833 members of press associations, meaning that the data offer a biased image in favour of the journalists hired. Therefore, it is believed that with a

more open sample the percentage of self-employed would be higher.

It is striking that being self-employed is not something initially desired or sought by journalists: three-quarters of self-employed journalists became freelance forced by the circumstances compared to 26 percent who chose to do so freely. Although there are more (47 percent) who work for several companies, it is especially noteworthy that 35.6 percent work for a single company or are integrated in its structure, which is known as “false freelance,” that is, someone who actually works in a company every day but pays their own Social Security.

4.3 Sources

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- [Facultad de Ciencias de la Comunicación](#), Universitat Internacional de Catalunya (Barcelona)
- [Facultad de Ciencias de la Información](#), Universidad Complutense de Madrid
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- [Grado en Comunicación](#), Universitat Oberta de Catalunya (Barcelona)
- [Grado en Periodismo](#), Universitat Abat Oliva (Barcelona)

5. Conclusions

5.1 Conclusion

The contemporary media system in Spain, consolidated from the 1980s onwards and which has largely survived to the present day, has begun to show signs of exhaustion. A combination of economic, technological and sociopolitical factors is opening the way to a new media landscape, with emerging players and new informative offers.

The economic crisis, which affected Spain particularly severely between 2008 and 2012, has accentuated the erosion of the media model in force for more than three decades in the country. Years of decline in sales and advertising, failed investments and stagnant business structures have resulted in several newspaper companies accumulating a multi-million-Euro debt.

There are some media, particularly television, that continue to be enormously lucrative and provide great profits to the companies that dominate that sector. However, even in this area, the emergence of new digital competitors, in many cases from abroad, has caused uncertainty about the future of the companies that control the market today. The situation of printed media is much more critical, because of its constant loss of audience and advertising investment. Meanwhile, the radio manages to maintain its niche, without its audiences or its advertising revenues being significantly diminished.

This situation of crisis or, at least, stagnation of traditional media, coincides with a proliferation of digital media. In the last decade, hundreds of digital publications of all kinds have been launched in Spain. Only a few have managed to achieve high brand recognition and have found a niche in the large media market, both at regional and even national level. The high degree of consolidation of digital native media has made Spain an international benchmark in this respect (Nicholls et al, 2016).

It is still too early, however, to gauge the real magnitude of this shift in the media landscape in Spain. Large corporations have begun to move by launching long-range digital projects, and have set up alliances with emerging media to reinforce their offer. Time will tell if in the coming years this process will result in the substitution of traditional brands for emerging ones, or in the coexistence of both in a scenario which, in any event, will have changed profoundly with respect to the one existing in recent decades.

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